Tuna Newsletter

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National Marine Fisheries Service
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National Marine Fisheries Service
- **Southwest Region**
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U.S. TUNA STATISTICS

The following articles were prepared by NMFS personnel from data and information gathered from sources in the U.S. tuna industry. (G. Sakagawa)

THE U.S. TUNA INDUSTRY IN SECOND QUARTER 1989

Pat Donley, SWR

Sixty-five vessels of the U.S. tropical tuna purse seine fleet were at sea at least one day during the second quarter of 1989, down six vessels from the number active in the second quarter of 1988 (Table 1). Total capacity at sea was down 8%.

Table 1. Number of active U.S. purse seine vessels and capacity (st) in the second quarter of 1989 and 1988.

AREA	1988	1989
	No. of vessels	
W. ATLANTIC	0	0
E. PACIFIC	41	31
W. PACIFIC	30	34
TOTAL	71	65
	Fleet capacity	
W. ATLANTIC	0	0
E. PACIFIC	39,895	29,145
W. PACIFIC	38,275	42,775
TOTAL	78,170	71,920

Receipts of all tuna species totaled 154,219 short tons (st) at U.S. canneries during the second quarter of 1989, up 23% from second-quarter 1988 and up 10% from the recent long-term (1984-1988) average (Table 2). Second-quarter deliveries from domestic sources were down 13% from 1988; imports were up 67%.

Skipjack was the largest component of second-quarter, raw tuna deliveries, comprising 52% of the total.

The western Pacific Ocean was the principal fishing area for tuna delivered to U.S. canneries in the second quarter of 1989, contributing 36% of total receipts (Fig. 1a).

Table 2. U.S. cannery receipts (st) of domestic and imported raw tuna by species in the second quarter of 1988 and 1989 and average 1984-1988.

		SPECIES[1]			
YEAR	SOURCE	ALB	SKJ	YF[2]	TOTAL
1988	Domestic	1,954	36,040	3,273	69,267
	Imported	23,260	19,793	13,162	56,215
	Total	25,214	55,833	44,435	125,482
1989	Domestic	1,159	33,719	25,351	60,229
	Imported	29,355	46,750	17,885	93,990
	Total	30,514	80,469	43,236	154,219
AVG 84-88	Domestic	1,557	34,880	28,312	64,749
	Imported	26,308	33,272	15,524	75,104
	Total	27,865	68,152	43,836	39,853

[1] ALB=albacore; SKJ=skipjack; YFT=yellowfin.
[2] Includes a small amount of bigeye, blackfin and bluefin tuna.

The eastern Atlantic was the principal source of albacore deliveries, contributing 46% of the total (Fig. 1b) and the western Pacific was the major source of skipjack tuna, contributing 52% of the total (Fig. 1c).

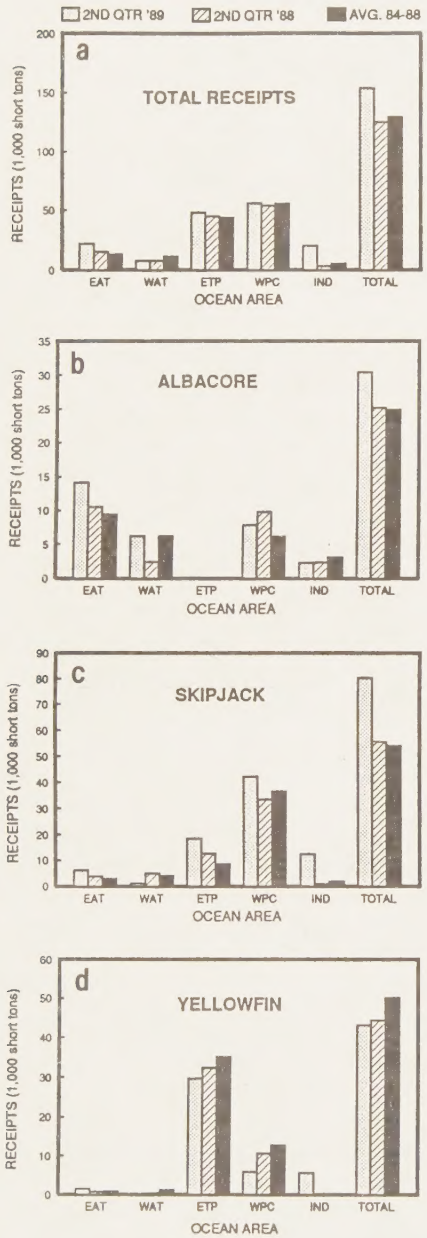

Fig. 1. Receipts (1000 st) of raw tuna by U.S. canneries by areas of capture in second-quarter 1988, 1989 and average 1984-1988. (a) total receipts. (b) receipts of albacore. (c) receipts of skipjack. (d) receipts of yellowfin (includes small amounts of bigeye, blackfin and bluefin).

The eastern Pacific was the source of 69% of U.S. cannery receipts of yellowfin tuna in the second-quarter (Fig. 1d).

Tuna fisheries of ten nations provided more than 90% of the raw, frozen tuna imported by U.S. canneries in the second quarter of 1989 (Table 3). Major suppliers were Taiwan, South Korea and France--Taiwan, principally albacore, and South Korea and France, skipjack tuna.

Contract prices for U.S.-caught tuna delivered to U.S. canneries in American Samoa and Puerto Rico in the second-quarter of 1989 were lower compared to the same period in 1988 (Table 4). Note that actual prices paid to contract U.S. vessels are determined at time of unloading and are subject to condition of the load such as temperature, salt content and physical condition of the fish. Prices paid to non-contract U.S. and foreign vessels varied according to market conditions and quality of fish at the time of unloading.

Imports of canned tuna not in oil to the U.S. in the second-

Table 3. U.S. cannery imports (st) of raw tuna by species and flag of catcher vessel in the second quarter of 1989. Total for second quarter 1988 is given for comparison.

	SPECIES[1]				
COUNTRY	ALB	SKJ	YFT[2]	TOTAL	1988 TOTAL
TAIWAN	23,209	2,374	671	26,254	17,304
S.KOREA	855	14,008	1,542	16,405	8,497
FRANCE	2	8,815	4,473	13,290	0
VANUATU	0	4,424	2,693	7,117	7,096
GHANA	0	5,404	1,532	6,936	4,702
SPAIN	0	3,577	1,250	4,827	1,111
JAPAN	2,872	902	4	3,778	4,188
VENEZUELA	0	2,291	1,379	3,670	3,524
ECUADOR	0	941	2,238	3,179	2,160
PANAMA	1,118	1	1,044	2,163	203
OTHER	1,299	4,013	1,058	6,370	7,430
TOTAL	29,355	46,750	17,884	93,989	56,215

[1] ALB=albacore; SKJ=skipjack; YFT=yellowfin.
[2] Includes a small amount of bigeye, blackfin and bluefin tuna.

Table 4. Cannery contract prices (U.S. dollars per st) for skipjack and yellowfin tuna caught by U.S. vessels that departed on trips in second quarter of 1988 and 1989 and delivered to American Samoa and Puerto Rico.

	SKIPJACK		YELLOWFIN	
SIZE CLASS (lbs)	1988	1989	1988	1989
American Samoa				
20 +	-	-	1200	1065-975
7.5 to 20	-	-	1060	895-775
7.5+	1050	870-750	-	-
4 to 7.5	1000	790-670	1010	790-670
3 to 4	800	595-460	800	595-460
3 -	525	335-250	525	335-250
Puerto Rico				
20 +	-	-	1200	1065-975
7.5 to 20	-	-	1075	910-785
7.5+	1010	885-760	-	-
4 to 7.5	945	800-675	1010	800-675
3 to 4	735	605-470	800	605-470
3 -	460	335-250	525	335-250

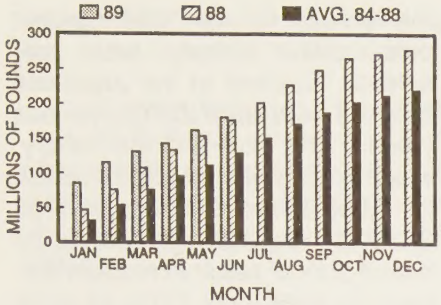

Fig. 2. Cumulative monthly imports (million of lbs.) of canned tuna not in oil to the U.S. for 1989, 1988 and average 1984-1988.

quarter of 1989 exceeded both 1988 and recent (1984-1988) average imports for the same period (Fig. 2). Imports to date of canned tuna not in oil, 181 million pounds, exceeded 1988 imports, for the same period, by 2% and the recent average by 39%. The 1989 quota of 76.7 million pounds, that triggers increased duty on canned imports, was reached on January 25, the earliest date on record. At the end of the second quarter, imports exceeded the quota by 136%.

Reported wholesale list prices for canned tuna were mixed in second-quarter 1989. Prices remained stable for some packs and declined slightly for others as compared to a year ago (Table 5). Actual wholesale prices paid for transactions vary according to market conditions and are not reflected in these statistics.

Doug Prescott, SWFC, and *Mike Thabault*, SWR, contributed to this article.

Table 1. U.S. catch (mt) of yellowfin tuna by Atlantic regions.

YEAR	GULF OF MEXICO	REGIONS: CARIBBEAN	REGIONS: EAST COAST	TOTAL
1986	3,200	700	1,800	5,700
1987	4,000	200	2,900	7,100
1988	7,300	100	2,000	9,400

Table 2. U.S. catch (mt) of tropical tunas from the western Atlantic and Gulf of Mexico made by coastal vessels.

YEAR	SPECIES[1]: YFT	SPECIES[1]: BET	SPECIES[1]: SKJ	TOTAL
1986	5,700	700	400	6,800
1987	7,100	1,000	600	8,700
1988	9,400	700	200	10,300

[1]YFT=yellowfin; BET=bigeye; SKJ=skipjack
[Data from Walter Nelson, Southeast Fisheries Center, Miami, Fl.]

U.S. ATLANTIC OCEAN CATCH OF TROPICAL TUNAS

Yellowfin tuna led the U.S. tropical tuna catch from the western Atlantic and Gulf of Mexico in 1988. A total of 9,400 mt of yellowfin tuna was caught in 1988: approximately 7,400 mt taken in the Gulf of Mexico and Caribbean Sea and 2,000 mt taken off the U.S. east coast (Table 1). The yellowfin tuna catch represented 91% of the total U.S. catch of tropical tunas for 1988 from the Atlantic and was an increase of 32% above the 1987 catch (Table 2). Virtually all of this catch entered the fresh-fish market, including export to the Japanese "sashimi" market.

Table 5. Wholesale list price (U.S. dollars per case) in California for tuna canned in water for white-meat and light-meat packs in the second quarter of 1988 and 1989.

PACK	YEAR	ADVERTISED LABEL	PRIVATE LABEL
White meat[1]	1988	59.50 - 63.75	51.00 - 51.50
	1989	64.50 - 65.00	50.00 - 52.00
Light meat[2]	1988	42.45 - 45.00	29.00 - 32.50
	1989	42.45 - 45.00	24.00 - 27.00

[1]White Meat: solid, 12.5 oz can (24 per case)
[2]Light Meat: chunk, 6.5 oz can (48 per case)

REPORTS

Original reports are published as a service to subscribers and may not represent the views of the SWR or SWFC. Readers should contact the authors of reports for details, if needed. (D. Au)

ELEVENTH NORTH PACIFIC ALBACORE WORKSHOP

Norman Bartoo, SWFC, La Jolla, CA

Executive Summary

There was cause for concern at the May 24-25, 1989, Eleventh North Pacific Albacore Workshop held at the Southwest Fisheries Center of the National Marine Fisheries Service in La Jolla, California. New analyses and data indicated that the condition of the north Pacific albacore stock may be much poorer than previously believed. A combination of declining CPUE, and increased effort in fisheries which harvest the young fish, unknown but possibly high incidental mortalities on very small fish by the squid drift net fishery, and apparently missing

or much decreased year-classes, all suggested possible recruitment problems.

On the positive side, the participants noted that environmental events such as the 1983 El Niño, may have played a significant role in the situation. Additionally, available analytical techniques may be emphasizing signals that are giving a dim picture.

Workshop participants recommended that analyses to confirm the stock condition be done. Further, they noted that any new look should be a joint study because of the difficulty in dealing with different data sets where a thorough knowledge of the data is needed.

Details

The workshop series was begun in 1974 by agreement between the Far Seas Fisheries Research Laboratory, Shimizu, Japan, and the SWFC. The Pacific Biological Station, Canada, later joined the agreement. Workshops are currently held on a biannual cycle.

The Eleventh Workshop had 28 participants from 6 countries. Dr. Norman Bartoo served as chairperson. A total of 19 working papers were presented. The papers dealt with data, fishery descriptions, assessment of the albacore stock, stock and population definition, and environmental effects as related to albacore behavior. Of great interest to the participants was the information on recent fisheries and the condition of the north Pacific population, which are reported here.

REVIEW OF RECENT FISHERIES. Recent developments in the albacore fisheries were summarized at the workshop. Catch statistics for the fisheries are summarized in Table 1.

a. Canadian Fishery. The Canadian fishery has remained quite small. In 1988, the total catch was 88 mt. The peak of the Canadian fishery occurred in 1972 and the fishery declined to landings generally below 100 mt since 1984. The principal reason for the low catches is thought to be decreased availability of albacore in Canadian waters, coupled with good salmon catches and prices, which moved most vessels into the salmon fishery. Approximately 60% of the Canadian catch is landed in Canada and 40% in the U.S. Canadian catch-effort data is included in the U.S. data.

b. Japanese Fishery The 1988-1989 fisheries were reviewed, and the forecast for the 1989 summer pole-and-line fishery was presented. Catches in the Japanese fisheries were lower than in previous years. The pole-and-line fishery, which had shown a decline in catch to 16,000 mt and 19,000 mt in 1986 and 1987, respectively, recorded its lowest annual catch in modern history: in 1988, only 7,000 mt were caught by the pole-and-line fleet. The Japanese longline fleet catches have continued at about the 15,000 mt level, typical of recent years. Drift gillnet catches ("Omi-Ami") were about 9,000 mt in 1986, 7,600 mt in 1987 and less than 5,000 mt in 1988, although some confusion exists about non-landed catches. In 1987, the number of large pole-and-line boats (200+ gross tons) declined to 89, of which 60 were active participants. Despite high prices for albacore, catch rates were low enough to make fishing unprofitable in many cases.

The forecast for the 1989 summer pole-and-line fishery prepared for the Japanese industry was discussed. Expectations for the summer season are about the same as for last year. This is due to the apparent very low abundance of age-5 fish, which is a key age class in the fishery. Additionally, ages-3 and-4 fish were forecasted to be reduced in abundance. To date, pole-and-

Table 1. Catches of North Pacific albacore in metric tons by fisheries, 1972-1988.

	JAPAN					TAIWAN			KOREA			UNITED STATES					CANADA	
YEAR	BAIT	LONG-LINE	GILL NET[3]	OTHER GEAR	TOTAL	LONG-LINE	GILL NET	TOTAL	LONG-LINE	GILL NET	TOTAL	BAIT	JIG	SPORT	GILL NET	TOTAL	JIG	GRAND TOTAL
1972	60,762	12,649	1	921	74,333	25		25				3,750	23,608	637		27,995	3,558	105,911
1973	69,811	16,059	39	1,883	87,792	35		35				2,236	15,667	84		17,987	1,270	107,084
1974	73,576	13,053	224	1,065	87,918	40		40				4,777	20,187	94		25,058	1,207	114,223
1975	52,157	10,060	166	402	62,785	28		28	319		319	3,243	18,975	640		22,858	101	86,091
1976	85,336	15,896	1,070	1,394	103,696	37		37	971		971	2,700	15,932	713		19,345	252	124,301
1977	31,934	15,737	688	1,039	49,398	61		61	65		65	1,497	10,005	537		12,039	53	61,616
1978	59,877	13,061	4,029	3,209	80,176	53		53	174		174	950	16,682	810		18,442	23	98,868
1979	44,662	14,249	2,856	1,280	63,047	81		81	27		27	303	6,801	74		7,178	521	70,854
1980	46,743	14,743	2,986	1,516	65,988				15		15	382	7,574	168		8,124	212	74,339
1981	27,426	18,020	10,348	959	56,753				600		600	748	12,694	195		13,637	200	71,190
1982	29,615	16,762	12,511	1,054	59,942				1,070		1,070	425	6,661	257		7,343	104	68,459
1983	21,098	15,103	6,884	471	43,556				1,233		1,233	607	9,512	87		10,206	225	55,220
1984	26,015	15,111	10,569	3,898	55,593				2,708		2,708	1,030	9,378	1,427		15,563[2]	50	73,914
1985	20,714	14,320	13,132	1,940	50,106				5,447		5,447	1,498	6,431	1,176	2	9,109	56	64,718
1986	16,096	12,945	9,749	2,192	40,982							432	4,708	196	3	5,339	30	46,351
1987[1]	19,091	14,642	7,617	1,394	42,744							158	2,766	74	5	3,003	104	45,851
1988[1]	7,000				12,000		11,000	11,000				598	4,212	64	15	4,889	85	27,974

[1]Figures for 1987 and 88 are preliminary and incomplete.
[2]U.S. total for 1984 includes 3,728 mt caught by purse seines.
[3]Japan gillnet catches include south Pacific catches.

line catches are only 500 mt--quite low and bearing out the forecast.

c. Korean Fisheries. No scientists from Korea were present to describe the Korean fisheries. In general, the participants were not aware of the details of the current fisheries.

d. Taiwan Fisheries. The Taiwan fisheries for albacore in the Pacific are concentrated in the south Pacific. Taiwan's catches from the north Pacific are mostly from drift gillnets. In 1988, an estimated 11,000 mt of albacore were taken with 14,629 fishing days. Estimates of catch and effort for previous years are being tabulated.

e. U. S. Fisheries. The U.S. fisheries for recent years were summarized in several working papers. The U.S. north Pacific catch continues to be low. In 1987, only about 3,000 mt were caught. This improved a bit in 1988, with a reported catch of about 4,900 mt. The fisheries were conducted farther northward in recent years and considerable effort has been diverted from this fishery into the south Pacific fishery.

DISCUSSION OF STOCK CONDITION INDICATORS

The participants reviewed several working papers which dealt with aspects of the stock condition of the north Pacific albacore, and arrived at some conclusions regarding the population.

Estimates of maximum average sustainable yield (MSY) were presented. The analysis was based on the generalized production model. Inputs to the model were catch and a version of standardized effort. The MSY estimates produced--94,000 mt, 140,000 mt and 203,000 mt (for m=2.0, 1.0 and 0.0, respectively)--differed from previous MSY estimates of 86,000 mt, 87,000 mt and 136,000 mt (for m=2.0, 1.0 and 0.0, respectively), although the lower ends of the ranges are relatively close. The participants noted that total catch was not used in the new analysis and that the effort standardization used may have shifted the points. Also, the ages of fish exploited may have shifted since the early 1980's because of incidental takes in the squid drift net fisheries, hence violating a basic assumption of the model. This means that with the current exploitation pattern, the model should yield a lower MSY than indicated above.

Basic trends in catch-per-effort (CPUE) were examined in different working papers. An analysis examined total effort versus standardized effort in all major fisheries. The conclusion reached was that both major surface fisheries, the pole-and-line and the troll fisheries, demonstrate strong declines in CPUE over the last decade. The longline fishery did not show as nearly a pronounced decline. However, the CPUE in the entire longline fishery for 1988 is the lowest reported since 1962 and is about 40% lower than the 1981 - 1987 average.

An analysis examined the effort standardization method used for data from the U.S. troll fishery. Previous effort standardization had utilized an analysis-of-variance technique to find adjustment factors for area, time and vessel size class (fishing power). The results were used to adjust CPUE, and the CPUE's showed a sharp decline over the last decade with a recovery in the last few years. Results from the new analysis showed that area stratification was most important and that an area-weighted CPUE, e.g., as calculated by the "Honma method," would be more appropriate, particularly when effort is concentrated in good fishing areas. When the Honma method is used, the CPUE trend for the U.S. troll fishery shows a rapid decline from the early 1970's through 1980, and a stable or slightly declining trend from 1980 through the present. Apparently, there was not a recovery of CPUE in recent years.

Two analyses addressed year class structures in the fishery, and the participants discussed possible outcomes. Data from the Japanese longline and pole-and-line fisheries both track year-classes or cohorts through the fisheries. Data from 1985 through 1989 suggest that the abundance of small fish may be low and decreasing relative to previous years. Two successive year classes, ages 3 and 4 in the summer of 1989, may be of very low abundance--something never previously seen. If this is true, reduced catches of age-3 fish in the 1989 U.S. troll fishery and age-4 fish in the summer pole-and-line fishery off Japan can be expected. The longline fishery for adults should also experience decreased catches of these two cohorts in the near future. The apparently very low abundance of age-5 fish is another reason that the summer pole-and-line season is expected to be the poorest ever.

An abundance index by age for fish taken in the longline fishery for 1986 through 1989 (the 1988-1989 winter fishery) was presented. This showed that young fish are a declining proportion of the longline catch, and indicated again that the abundance of small fish, ages 3, 4 and 5 in 1989, may be at an all-time low.

SECOND MEETING OF SPAR GROUP

Gary Sakagawa, SWFC, La Jolla, CA, *Jerry Wetherall,* SWFC, Honolulu, HI

Urgency and tension characterized the second meeting of the South Pacific Albacore Research (SPAR) group in Suva, Fiji, 12-21 June 1989. At issue were concerns, particularly of the south Pacific governments, that the exceptionally fast development of the surface fishery had depleted the resource,

especially as a result of high-seas gillnetting. The participants reviewed what is known about the stock, and outlined the requirements to enable accurate assessments and protect the productivity of the population.

SPAR was organized in 1986 to facilitate data exchange and research among researchers studying the population biology and resource potential of south Pacific albacore. The group, consisting of researchers from the United States, New Zealand, France and the South Pacific Commission, concentrated on coordination and cooperation in the conducting of research cruises and in the collection of data. The group had not expected so rapid a buildup of the surface fishery and its associated management concerns.

The participants at Suva were from south Pacific island countries as well as from Australia, France, Japan, Taiwan, the United States, and from SPC, FFA, ORSTOM, and FAO. The group felt compelled to rethink and reorient its priorities to address the rapidly emerging management questions about total catch, the probable effects of the different fisheries on the stock, and on how to coordinate research and data collection.

High priority was given to reviewing information from the different fisheries. This review concluded that data were incomplete or inadequate. The catch for 1989 had to be estimated from incomplete information. An estimated 61,000 to 90,000 mt of albacore are believed to have been caught in 1989, up from a total catch of 31,000 mt in 1988. All of this increase is from the surface fishery, primarily due to drift gillnet effort. More than 50% of this catch are believed to be small, subadult fish. The group noted that additional fishing mortality is likely due to the dropout of dead fish from nets and injured fish that escape but later die from injuries. The total fishing mortality from the surface fishery appears to be high and is expected to markedly reduce future yields of the longline fishery, which takes older fish.

The group warned that if inadequate data continue to be supplied, accurate assessments and precise management advice should not be expected, and the fisheries and resource will be at high risk from inappropriate management actions. The group recommended that all parties concerned about the resource make immediate commitment to collect accurate and complete data on the fisheries, including biological samples from the catches, and to fund and support required studies for stock assessment and evaluation of the effect of fishing on future yields. The group went further and specified the data required from each fishing fleet, outlining the analytical methods to be used in analysis of stock condition. They also specified a research action plan for tagging, age and growth studies, for determining the season of spawning, the amount of dropout from gillnets, for oceanographic studies of the subtropical convergence zone, and for a procedure to enable rapid communication and distribution of information.

The place and time for the third SPAR meeting is to be determined by the organizers at a later date.

RECENT DEVELOPMENTS IN TUNA FISHERIES

The following news articles were compiled from reports of the NMFS Branch of Foreign Fisheries Analysis, Office of International Fisheries, Washington, D.C. Dennis Weidner, Don Jacobson, P. Niemeier and Francisco Quintanilla contributed to these reports, with the assistance of other NMFS officials and U.S. Foreign Service officers. (P. Kleiber).

AFRICA

Ghanaian Export and Joint Venture Opportunities -- Ghana has been producing only about half the amount of fishery products required for its domestic consumption. The remaining domestic demand must be satisfied through imports, mostly Soviet frozen fish. The 1988 catch was down 27,000 mt from 1987 to 303,000 mt. Government officials claim that Ghanaian marine resources are fully exploited; hopes that inland fisheries could produce more have not been fulfilled. Other sources suggest that tuna fisheries could yield 60,000 mt, compared to about 35,000 mt caught in 1988. The Government of Ghana is privatizing the fisheries sector and is seeking foreign investments through joint ventures. A foreign aid project to overhaul the infrastructure of the port of Tema and to build a tuna cannery is being funded by the UN, Japan, Denmark, OPEC, and the Arab Development Bank.

LATIN AMERICA

Brazilian Tuna Exports -- Brazil has become an important supplier of tuna to the United States. Brazilian shipments to the United States were 5,600 mt in 1988, primarily skipjack. Shipments totaled 2,100 mt during the first 4 months of 1989, a decline of 30% from the 3,000 mt exported during the same period of 1988.

Chilean Tuna and Swordfish Fishery-- Fishermen targeting swordfish and tuna are benefiting from a fishing program developed by two universities (Valparaiso Catholic University and the University of Chile). Professors at the universities are teaching artisinal fishermen to read temperature maps in a project called "SATAL". Project director Dr. Maria Angela Barbieri says that SATAL uses NOAA data transmitted to the satellite tracking station at Peldehue, north of Santiago. The SATAL teams regularly meet with the fishermen's union at Caleta Quinty, near Valparaiso.

Ecuadorean Fishing Industry -- Fishing companies in Ecuador's principal export-oriented fisheries are reporting economic difficulties in 1989. Inflation in Ecuador is running at about 60 percent a year, significantly increasing production costs. The Government controls exchange rates and has only devalued the sucre, Ecuador's monetary unit, about 30 percent. As a result, exporters are having increasing difficulty covering rising domestic costs with their foreign exchange earnings. Tuna fishermen and packers report that costs are exceeding income.

Mexico Expands Gulf Tuna Fishery -- The Mexican tuna fishery has been conducted primarily in the Pacific with only limited operations in the Gulf of Mexico. The Mexican Government has now decided to break a long-standing policy of discouraging the purchase of foreign-built vessels to substantially expand tuna fishing in the Gulf of Mexico. The International Trade and Commerce Corporation (Fort Lee, N.J.) has signed a $22 million contract with a Mexican cooperative located in the Gulf of Mexico port of Veracruz. The initial agreement calls for the purchase of eight multipurpose fishing vessels by the cooperative, the first major U.S. vessel sale to Mexico in over 10 years. The first vessels could be delivered as early as December 1989. The vessels will be equipped to longline for yellowfin tuna or trawl for bottomfish. The two groups are currently discussing the possible delivery of 16 additional vessels.

Mexico's Tuna Exports -- Mexico's tuna industry trade association reports that the country exported 75,000 mt of tuna in 1988. Europe (principally Italy) continues to be Mexico's principal market, accounting for about half of total shipments. Asian countries (32%) and the United States (17%) were the other principal markets. Increased shipments to Japan were particularly notable. Shipments totaled about 24,000 mt, a 140% increase from the 10,000 mt shipped during 1987. One of the reasons for the increase is that Japanese canners are increasingly turning to yellowfin, which is the primary species taken by Mexican fishermen.

Mexico's Tuna Fishery -- Mexico's tuna fishermen are reporting record catches. The Mexican eastern Pacific fishery totaled 74,100 mt of yellowfin and skipjack during the first six months of 1989, an increase of more than 30 percent from the 56,900 mt taken during the same period of 1988. Most of the increase is due to a sharp jump in skipjack landings, which rose from 5,400 mt in the first six months of 1988 to 18,200 mt for the same period of 1989, an increase of nearly 240 percent. Yellowfin landings, on the other hand, rose less than 10 percent, from 51,500 mt in 1988 to 55,900 mt in 1989, and the yellowfin share of Mexico's total tuna catch fell from 90 to 75 percent. This is important because most of Mexico's European and Asian customers demand yellowfin tuna.

Mexico Increases Tuna Canning -- The Secretaria de Pesca (SEPESCA) reports that Mexican canneries processed 23,000 mt of tuna in 1988, more than a 30 percent increase over the 17,500 mt canned in 1987. The record year, however, was 1985 when 26,100 mt were canned. Mexico had difficulty exporting the catch of its expanding tuna fleet that year, so unusually large quantities were sold to domestic canners. Almost all of Mexico's canned tuna production consumed domestically; Mexican companies exported only 23 mt of canned tuna in 1988.

Japanese Tuna Joint Venture Fined -- The Mexican Government has severely fined the COPEMAPRO tuna/billfish longline joint venture for a variety of infractions. COPEMAPRO is a Japanese-Mexican joint venture based in Ensenada and operates 12 longliners along Mexico's Pacific coast. The Mexican Navy seized one of the joint venture's longliners (COPEMAPRO V) in March, 1989, off Ensenada. The COPEMAPRO V's license was also revoked. In an unrelated incident, the Navy seized two more vessels (COPEMAPRO VII and VIII) off San Carlos during early August. The Navy reported several violations including the take of 800 mt of a species (squid) not permitted by the vessel's license and an inadequate number of Mexican crewmen. The fishing gear and catch were confiscated and the vessel's licenses were revoked. Fines for the two vessels were about $180,000. SEPESCA is now considering the cancellation of eight more COPEMAPRO longliners because the joint venture is unable or unwilling to supply requested data. Sport fishing interests have been asking SEPESCA to terminate the joint venture for years, convinced COPEMAPRO's longlinging activities were depleting billfish stocks.

Venezuela Assists Tuna Canners -- The Venezuelan Government plans to advance tuna canners 80 percent of the foreign exchange needed for tuna imports in an effort to increase domestic tuna supplies. Canneries had previously been forced to wait 180 days for foreign exchange, making purchases extremely difficult. Venezuela has a large tuna fleet active in the Eastern Pacific, but these fishermen avoid selling their tuna in Venezuela at the Government-controlled prices. As a result, Venezuelan canneries have had to begin importing tuna. The Government's requirement that tuna fishermen sell 40 percent of their catch domestically has largely been ineffective.

SOUTH PACIFIC

South Pacific Forum Fisheries Agency Celebrates 10th Anniversary --To celebrate the 10th anniversary of the South Pacific Forum Fisheries Agency, a conference on management and development

strategies in south Pacific fisheries was held in Honiara on September 18-25, 1989. A wide range of fisheries issues were discussed, including the U.S. fisheries treaty, the crisis in the drift net albacore fishery in the south Pacific, initiatives by the Soviet Union and fisheries relations with Japan. A corporate plan to meet the needs of the south Pacific countries in the next ten years was unveiled. Inquiries concerning the conference should be directed to the FFA, Honiara, Solomon Islands, Attn: Executive Officer, phone 677 21124, fax 677 23995 or telex 778 66336.

NOTICE:

The Tuna Newsletter is issued four times a year as a product of the Southwest Regional Office and Southwest Fisheries Center of NMFS. With the departure of Wes Parks, former editor, a new publication team has been assembled with leadership responsibility assigned to Diane Pickelsimer for production, David Au for reports, Pat Donley for U.S. statistics, Al Jackson for copy editing, Pierre Kleiber for news on fishery developments, and Ken Raymond for art.

The team will continue to concentrate on events and topics of interest to U.S. subscribers and use contributions from staff and outside sources. We welcome your comments and suggestions. They have been useful in improving our product and in better understanding your needs.

If you wish to continue receiving the Newsletter and have not yet mailed your subscription card, please do so immediately or notify us by letter. We are required to purge our mailing list annually. The next issue will be mailed to only those that have submitted their subscription card or notified us of their interest in remaining on the mailing list. (G. Sakagawa)

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